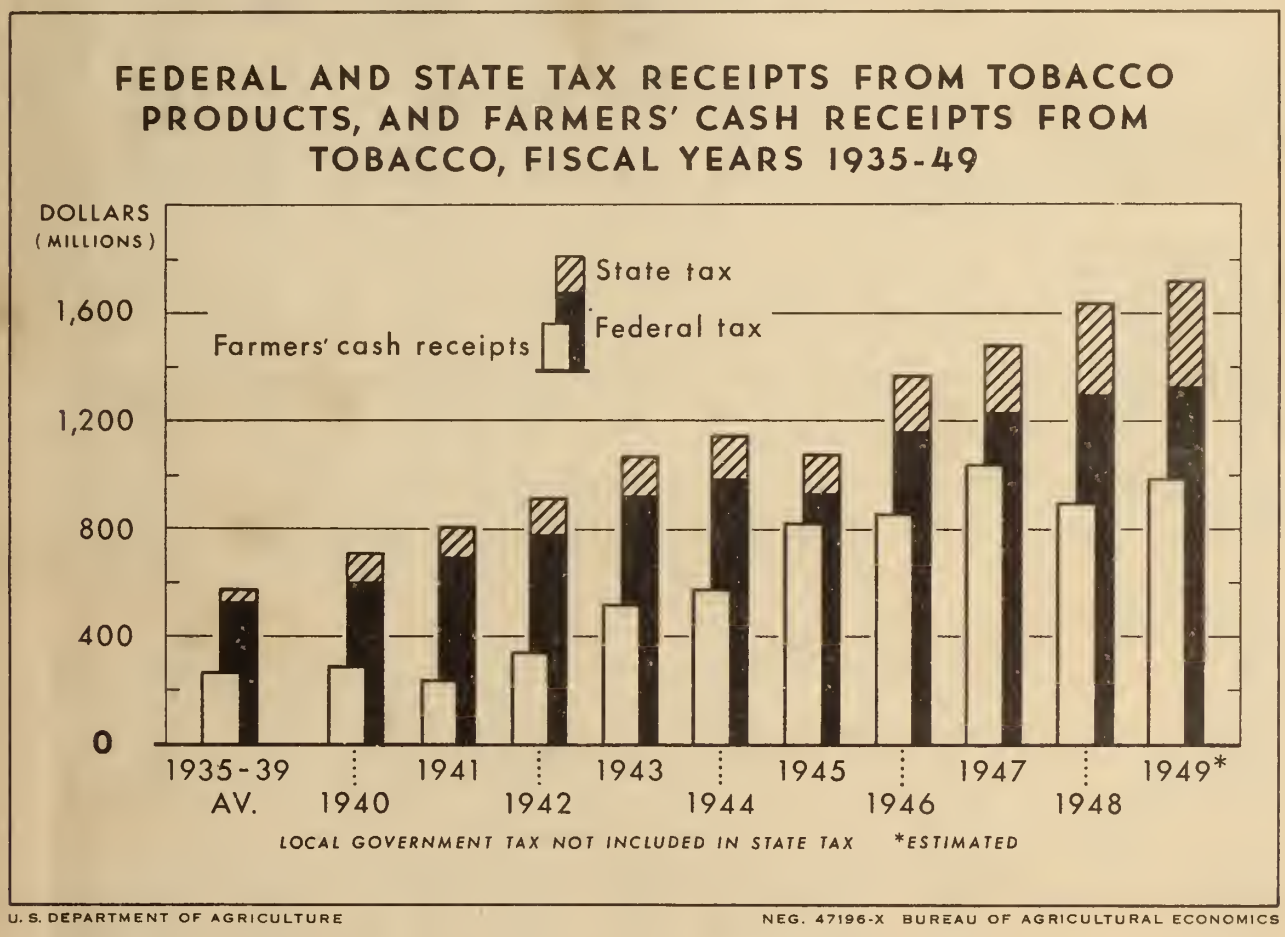
UNIV. OF FL LIB. DOCUMENTS DEPT. U.S. DEPOSITORY

THE Tobacco SITUATION

FOR RELEASE MAY 31, A. M.

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

TS-48 BAE MAY 1949



U. S. DEPARTMENT OF AGRICULTURE NEG. 47196-X BUREAU OF AGRICULTURAL ECONOMICS

The combined Federal and State tax receipts from tobacco products amount to substantially more than the cash receipts received by growers for tobacco leaf. In recent years, both Federal and State tax receipts from tobacco products and also growers' cash receipts from the sale of tobacco leaf have been considerably greater than in the prewar and early war years. The Federal tax rate on cigarettes and cigars was increased in 1942. In recent years, a number of States have increased the tax rate on cigarettes and additional States have levied tobacco taxes for the first time. Compared with prewar, cigarette consumption has more than doubled and has required a considerable increase in the production of cigarette tobacco. The combined Federal and State tax receipts from tobacco in the 1949 fiscal year is estimated at 1,720 million dollars, the largest amount ever collected in any fiscal year. State tax receipts comprise about 23 percent of this total compared with 8 percent in 1935-39. Cash receipts from tobacco received by growers during fiscal 1949 is estimated at 985 million dollars, second only to 1947 fiscal year.

STATISTICAL SUMMARY

Item	Unit or base period	1947-48 Dec.	1947-48 Jan.	1947-48 Feb.	1947-48 March	1948-49 Dec.	1948-49 Jan.	1948-49 Feb.	1948-49 March	Last data available as percent of a year earlier
Prices received at auctions										
Flue-cured	Cents per lb.	35.4	30.0	1/	1/	38.9	1/	1/	1/	110
Burley	do	48.8	48.2	41.4	1/	47.7	44.6	37.1	1/	90
Fire-cured	do	27.4	29.2	29.4	29.0	31.9	31.5	31.2	31.4	108
Dark air-cured	do	25.5	26.2	25.8	23.7	28.5	29.0	26.3	1/	102
Parity Prices										
Flue-cured	do	48.1	48.8	48.1	48.1	48.1	47.6	47.2	47.2	98
Burley	do	46.6	47.3	46.6	46.6	46.6	46.2	45.7	45.7	98
Fire-cured	do	22.3	22.6	22.3	22.3	22.3	22.0	21.9	21.9	98
Dark air-cured (35-36)	do	17.9	18.1	17.9	17.9	17.9	17.7	17.5	17.5	98
Virginia sun-cured (37)	do	23.9	24.2	23.9	23.9	23.9	23.7	23.5	23.5	98
Index of Prices Paid 2/	3/1919-28=100	164	166	164	164	164	162	161	161	98
	4/1934-38=100	210	213	210	210	210	208	206	206	98
Tax-paid Withdrawals										
Cigarettes, small 5/	Million	24,799	27,278	23,349	29,154	24,675	28,006	25,358	31,177	107
Cigars, large 5/	do	447	461	461	470	440	438	411	457	97
Chewing and Smoking	Million pounds	13	16	15	17	13	15	14	17	100
Snuff	do	2.5	3.9	3.4	3.6	3.4	3.5	3.1	3.8	106
Accumulated since Jan. 1										
Cigarettes, small 5/	Million	335,964	27,278	50,628	79,782	348,730	28,006	53,364	84,540	106
Cigars, large 5/	do	5,631	461	922	1,393	5,775	438	849	1,307	94
Chewing and Smoking	Million pounds	199	16	30	47	200	15	29	45	96
Snuff	do	39	4	7	11	41	4	7	10	91
Cigarettes, tax-free	Million	2,997	3,213	3,578	3,197	3,185	2,208	2,570	3,168	99
Accumulated since Jan. 1										
Tax-free	do	34,151	3,213	6,790	9,987	38,691	2,208	4,778	7,946	80
Tax-paid plus tax-free	do	370,115	30,491	57,418	89,769	387,421	30,213	55,934	92,487	103
Stocks, beginning of quarter 6/ (farm-sales weight)					April 1				April 1	
Flue-cured	Million pounds		1,973		1,804		2,023		1,767	98
Burley	do		1,096		1,174		1,112		1,247	106
Maryland	do		45		37		47		38	103
Fire-cured	do		131		195		152		203	104
Dark air-cured	do		79		91		80		95	104
Cigar, filler	do		105		115		105		119	103
Cigar, binder	do		124		152		121		151	99
Cigar, wrapper	do		23		18		23		20	111
Exports (farm-sales wt.)					March				March	
Flue-cured	Thou. lb.	44,570	22,253	30,152	18,439	48,767	41,220	29,901	17,742	96
Burley	do	1,457	501	2,285	648	4,659	3,739	3,471	2,557	395
Maryland	do	456	63	736	260	2,643	1,149	840	1,029	396
Fire-cured	do	2,416	2,355	2,036	1,225	4,775	1,845	2,129	3,155	258
Dark air-cured	do	442	434	666	313	543	586	580	1,609	514
Cigar	do	785	172	928	258	1,831	4,739	3,683	1,910	740
Total 7/	do	50,127	25,793	36,825	21,143	63,221	52,756	40,270	28,003	132
Accumulated since beginning of crop year										
Flue-cured	do	220,661	242,912	273,064	291,504	254,971	296,191	326,092	343,833	118
Burley	do	9,293	9,794	12,078	12,727	8,609	12,349	15,819	18,376	144
Maryland	do	6,581	8/ 63	736	1,059	8,154	8/1,149	1,989	3,019	285
Fire-cured	do	7,923	10,277	12,312	13,538	9,832	11,678	13,807	16,960	125
Dark air-cured	do	1,750	2,186	2,850	3,163	1,697	2,282	2,864	4,470	141
Cigar	do	2,539	2,835	3,763	4,021	2,214	6,953	10,636	12,544	312
Personal income 9/	Billion dollars	208	209	206	206	221	219	216	214	104
Index of Industrial Production 10/	1935-39=100	190	189	190	188	190	187	185	181	96
Percent Labor Force Employed	Monthly	97.2	96.5	95.6	95.9	96.8	95.6	94.7	94.8	99

1/ Closed. 2/ For computing tobacco parity prices. 3/ All types except flue-cured 11-14 and Burley 31, but Maryland 32 begins 1949 with 1936-40 season = 100. 4/ Flue-cured 11-14 and Burley 31. 5/ Includes Puerto Rico. 6/ Stocks for April 1, 1949, are preliminary. 7/ Includes a small amount of Perique. 8/ Beginning of crop year. 9/ Seasonally adjusted monthly totals at annual rate. 10/ Unadjusted.

THE TOBACCO SITUATION

Approved by the Outlook and Situation Board May 23, 1949

SUMMARY

Farmers will produce less tobacco this year than last if they harvest the acres indicated when queried on March 1, and if yields per acre are near the average for recent years. The prospective acreage as of March 1 is 2 2/3 percent larger than in 1948 but the yields per acre are not likely to equal last year's exceptionally high yields. Acreage allotments for flue-cured are higher for 1949 than they were for 1948, and prospective acreage was up nearly 5 1/2 percent. Flue-cured production may range between 1,070, and 1,110 million pounds compared with last year's production of 1,090 million pounds. The 1948 yield per acre of flue-cured was the highest on record. Growers of Burley and Maryland planned slightly larger acreages as of March 1. Burley production is not likely to be so large as last year when the second highest crop in history was produced with yields per acre averaging 11 percent above the previous record yield of 1946. The March 1 prospective acreage of fire-cured and dark air-cured was smaller than last year's harvested acreage. In both instances, allotments were reduced below those of a year ago. Cigar tobacco types, together with Maryland, type 32, and Virginia sun-cured, type 37, are not under quotas and allotments. Smaller production of cigar filler and binder is expected, but some increase may occur in cigar wrapper.

Domestic use of cigarette tobacco is expected to continue high because cigarette consumption in the United States in 1949 will probably equal or exceed the 1948 record. The output of cigars and the use of cigar tobacco may be lower than last year. Cigar consumption is more responsive than cigarette consumption to changes in general economic activity and consumer income. Domestic use of tobacco in other products, such as chewing tobacco and smoking, has been running a little lower in recent months than in comparable months a year ago. Snuff manufacture and consumption have also been slightly less but are expected to bealmost the same for the year as a whole.

United States exports of unmanufactured tobacco were smaller in 1948 than in 1947, but during the first quarter of 1949 they have exceeded January-March 1948 by about 40 percent. It seems probable that United States exports of unmanufactured tobacco in 1949 will be around 450 million pounds (declared weight) compared with 427 million pounds in 1948. The quantities being financed by the Economic Cooperation Administration have been a significant factor in total tobacco exports during the current fiscal year and are expected to continue important in the year ahead. British purchases of tobacco during 1949 are expected to exceed those of 1948. Substantial quantities of tobacco have been going to Germany in the last few months, and the fiscal-year total will be considerably above the years of the Hitler regime.

At the beginning of the 1949-50 marketing year, carry-over of most of the various kinds of United States tobacco will be higher. Flue-cured and cigar binder are exceptions; they will probably be lower than at the outset of 1948-49. Burley, cigar filler, and wrapper probably will show the largest relative increases in carry-over. Total supply of all tobacco for 1949-50 may not differ very much from that for 1948-49 according to present estimates of carry-over and the probable 1949 production. Total supplies of flue-cured, fire-cured, and cigar binder may be down slightly, but supplies of Burley, domestic cigar filler, and wrapper are expected to be a little larger than for the current marketing year.

Present parity prices for tobacco are below those which determined the price supports for the 1948 marketing season. The declines in parity prices reflect the easing of the index of prices paid by farmers from last June, which is the month that determines the level of flue-cured price support; and from last September, which determines the level of price support for all other types. Some further decline by June and September of this year may be in prospect. The price-support levels for the 1949 crop are likely to range between 4 and 6 percent below those for the 1948 crop. An active demand is expected to maintain the average market price for flue-cured above the loan level. Prices for other types may be moderately lower than last season, but the season averages are expected to be within the range of the average prices received within the last few years.

Cigarette production for the 1948-49 fiscal year is likely to be between 380 and 385 billion, compared with 379 1/2 billion in 1947-48. Though cigarette exports have recently been running below the same period a year ago, domestic consumption has been running ahead. Consumer demand for cigarettes has been little affected, if any, by the small decline in personal income that occurred in the first quarter.

Cigar consumption during the 1948-49 fiscal year is expected to be between 5,600 and 5,675 million compared with 5,688 million in the preceding fiscal year. Consumption of cigars in the lower price brackets--8 cents or less--gained 2 percent in January-April 1949 over the same period of 1948, but those selling for more than 8 cents dropped 11 percent.

Production of smoking tobacco in the 1948-49 period may fall short of the 109-million-pound output in the period July 1947-June 1948. The consumption in the year ahead could be expected to increase if any considerable rise in unemployment or sharp falling off of personal income should take place.

Total output of chewing tobacco in the 1949 fiscal year may be 4 or 5 million pounds smaller than the 101 million pounds in July 1947-June 1948. Plug seems likely to decline relatively more than scrap chewing.

Snuff consumption in fiscal 1949 may be slightly smaller than the 41 million pounds used in July 1947-June 1948. This is above the prewar average but the use of snuff has not varied much from year to year over the last quarter-century even though total population in the United States has increased 28 percent.

TOBACCO PRODUCTS

Cigarettes

Cigarette manufacture of 92 1/2 billion in the first quarter of 1949 was about 3 percent above the same quarter of 1948 and exceeded the first quarter output of any previous year. The June 1948-July 1949 total is expected to be between 380 and 385 billion, compared with the previous fiscal year record of 379 1/2 in 1947-48. Domestic use of cigarettes continued to advance during the first quarter of 1949 and increases over the same period a year ago more than offset the decrease in cigarette exports. Consumer demand for cigarettes was but little affected, if at all, by the slight decline in personal income that took place in the first quarter. Preliminary reports indicate that tax-paid withdrawals of cigarettes during April were down from March and also less than the unusually large figure for April a year ago. However, United States cigarette consumption is expected to continue relatively large during the remainder of 1949. If employment and income continue near recent levels, which, though below the peaks, are still well above previous comparable periods, domestic use of cigarettes during 1949 is likely to reach a new high.

Table 1.- Cigarette exports from the United States to principal importing countries, 1934-38 averages; annual 1947-48 with percentages; and January-March 1948-49

Country	Calendar year			1948 as a percentage of		January-March	
	1934-38	1947	1948	1934-38	1947	1948	1949
	Million	Million	Million	Percent	Percent	Million	Million
Philippines, Rep. of	2,544	9,640	11,575	455	120	3,337	1,471
Belgium-Luxembourg	63	1,651	1,895	3,008	115	276	213
Hong Kong	22	1,444	748	3,400	52	218	123
Sweden	80	1,309	359	449	27	3	146
Curacao (N.W.I.)	105	759	1,221	1,163	161	292	301
Netherlands-Indies	16	690	80	500	12	17	51
Colombia	90	670	480	533	72	119	6
Panama, Rep. of 1/	389	628	719	185	114	162	178
Venezuela	39	583	702	1,800	120	150	208
Tangier 2/	12	543	1,015	8,458	187	477	319
Switzerland	16	351	826	5,162	235	133	105
Mexico	31	285	285	919	100	96	60
Cuba	47	281	312	664	111	73	81
Czechoslovakia	1	277	502	502	181	57	128
Argentina	64	184	61	95	33	58	0
Subtotal	3,519	19,295	20,780	591	108	5,468	3,390
Total all countries 3/	4,770	22,796	25,179	528	110	6,713	4,166

1/ Includes Canal Zone.
2/ Includes French Morocco.
3/ Includes exports to Germany and Japan under the Army Civilian Supply Program, which in 1947 were 405,142,000 and in 1948 were 208,722,000.

Cigarette prices at wholesale and retail have remained practically unchanged since the increases were put into effect by manufacturers in late July 1948. The value of sales of large cigarette manufacturers was about 7 percent greater in 1948 than in 1947; and 1948 net income increased around 25 percent over the preceding year. In some States, purchasers of cigarettes have had to pay more per package because of newly levied or increased State and local taxes on cigarettes in the past year. State tax receipts from tobacco products, chiefly cigarettes, have increased sharply in the last few years (see cover chart). In 1949 they are estimated to be about 9 times the average annual collections in the period 1935-39.

Cigarette exports during the first quarter of 1948 dropped 37 percent below the same quarter in 1947. Annual exports of cigarettes in 1948 were a record high of 25 billion, compared with 23 billion in 1947 and 24 billion in 1946. The 1946-48 level was about 5 times the prewar annual average. United States exports of cigarettes in 1948 were valued at nearly 68 million dollars--13 percent more than 1947 and 7 1/2 times the 1934-38 average annual value. The Philippine Republic has been the first ranking importer of American cigarettes and accounted for 38 to 46 percent of the total during the last 3 years. The Philippine Government has taken steps to conserve dollar exchange and expand its own manufacture of cigarettes, so fewer United States cigarettes are being imported in 1949. Among other important foreign destinations showing a decrease from the first quarter of a year ago are Tangier and French Morocco, Belgium-Luxembourg, Hong Kong, Colombia, and Switzerland.

Cigars

During the first four months of 1949, cigar consumption in the United States was 1,735 million, or 6 percent less than in the same period of 1948. Cigar consumption is generally more responsive than cigarettes to declines in consumer income, and the recent drop may be partly attributed to income. It seems likely that the fiscal year total (July 1938-June 1949) will be between 5,600 and 5,675 million, compared with 5,688 million in the preceding fiscal year. Tax-paid withdrawals of large cigars in April were almost 5 percent below those of last April.

Some cigar firms have reduced the prices of certain brands. The Bureau of Labor Statistics wholesale price index for popular brands dropped almost 1 percent from February to April but is still slightly above April 1948. The index of medium-priced brands has been practically unchanged since early 1947.

Total cigar sales were lower during the first four months of 1949 but those selling for 8 cents or less made a gain of 2 percent over the same period a year ago. Consumption of cigars selling for more than 8 cents dropped 11 percent below the period of January-April in 1948.

Cigar production and consumption for 1949, as a whole, will show some decline from last year. Any additional reductions in price of cigars would probably mean a greater consumption than would otherwise be the case.

Smoking Tobacco

The output of smoking tobacco in 1948 was nearly 108 million pounds--a gain of about 3 million pounds over 1947. For the 8 months ending with February 1949, however, the manufacture of smoking tobacco was about 3.6 percent less than in the same period of the preceding year. The 1949 fiscal-year total is expected to fall short of the 109 million-pound output in July 1947-June 1948.

For the 3 calendar years 1946-48, the production of smoking tobacco has deviated very little from the 3-year average of 106 million pounds, but this is considerably less than the figures for any of the war years and only slightly more than half the 1937-41 average. Any significant rise in unemployment and any sharp falling off of income would probably result in a larger consumption of smoking tobacco than in recent years as smoking tobacco generally costs the user less than the equivalent in cigarettes or cigars. The BLS index for wholesale prices of smoking tobacco was unchanged during 1948 and the first four months of 1949, after having made some advances during 1946 and 1947. The April level of this index was 14 percent above 1939. The average price paid by farmers for packaged smoking tobacco in 1948 was $1.04 per pound, which was about one-third higher than the average price paid in 1939. According to BLS data, retail prices of pipe tobacco in large cities went up a little less than one-fifth between 1939 and 1948.

Exports of smoking tobacco in bulk and in packages in the first quarter of 1949 totaled 564 thousand pounds, 8 percent lower than the same quarter last year.

Chewing Tobacco

Total output of chewing tobacco of 96 1/2 million pounds during 1948 was lower than in any previous year. Though only 2 million pounds less than in 1947, it was almost 10 percent below the 1937-41 average, and 23 percent less than the wartime peak in 1944. Plug and scrap account for about nine-tenths of all chewing tobacco. The manufacture of plug fell 2 million pounds from 1947 to 1948, while scrap held about even. Twist tobacco gained 9 percent, while fine-cut dropped 14 percent from 1947 to 1948.

The total production of chewing tobacco in the fiscal year 1949 seems likely to be 4 or 5 million pounds less than the 101 million pounds in July 1947-June 1948.

The wholesale price index for chewing tobacco has been unchanged since the advance it made in late 1946, but is about 30 percent above prewar.

United States exports of chewing tobacco and snuff (separate figures for each not available) during January-March of 1949 were only about two-fifths of those in the same months of 1948. This sharp drop was mainly due to the fact that two-thirds of the total shipments of 1 1/2 million pounds in January-March 1948 were sent to Japan and Germany, whereas virtually none was shipped to these 2 countries during the first 3 months of this year. A smaller quantity went to the Philippine Republic in January-March 1949 than in the first quarter of 1948.

Snuff

Consumption of snuff in the United States during the first four months of 1949 was 13.8 million pounds, about 6 percent less than in the same period of 1948. The 1949 fiscal-year total will probably be slightly lower than the 41 million pounds used during the 1948 fiscal year. This is higher than the 1935-39 average of 37 million pounds but below the 42- and 43-million-pound level reached in some of the war years. The use of snuff has not grown as much as the population, over the past quarter-century, but has been characterized by a high degree of stability from year to year. The BLS wholesale price index for dry sweet snuff has been unchanged since February 1948. Just before that time, there was a fairly sharp increase in this index. The April level was a little more than 60 percent above the year 1939.

EXPORTS 1/

It seems probable that exports of unmanufactured tobacco from the United States during 1949 will exceed both 1948, and the average of the prewar years 1934-38. In the first quarter, shipments were running ahead of those of the same period a year ago, although the dollar shortage is still the most influential limitation on the takings of many countries. The quantities of tobacco being financed by the Economic Cooperation Administration have been a significant influence in the shipments of tobacco during the past year and is expected to continue important in the months ahead. The 1949-50 program data 2/ presented to Congress by the ECA for purposes of illustration, indicated 112 million dollars of imports of U. S. tobacco by cooperating European countries to be financed by ECA. This was 57 percent of the ECA estimate of total dollar imports of tobacco by these countries. Exports of United States tobacco to Germany have reached a much higher level than in any previous period back to the pre-Hitler regime of the late twenties. The United Kingdom, which last year sharply curtailed imports of United States tobacco has indicated that more tobacco will be bought in the United States in 1949. If anticipated larger British purchases move promptly into export during late 1949, the calendar-year (1949) total exports of tobacco to all countries will probably reach about 450 million pounds, compared with 427 million last year and 1934-38 average of 437 million pounds.

Exports of unmanufactured tobacco from the United States during the first quarter of 1949 totaled 108 million pounds, exceeding the relatively small first-quarter shipments of 1948 by 31 million pounds. This was a gain of about 40 percent over the first quarter a year ago, and the total topped the average for January-March 1934-38 by 8 percent. Last year, the total was 16 percent below the previous year and 2 percent less than the prewar average.

1/ Quantities of tobacco in this section are stated in terms of export weight, which is less than the equivalent farm-sales weight.

2/ Estimate does not include French and Netherlands dependent territories, Portugal, Trieste, and Turkey.

Table 2.- United States exports of unmanufactured tobacco, for specified periods, by types, to principal importing countries

(declared weight)

Type and country	Calendar year			1948 as a percentage of		January-March		
	1934-38 average	1947	1948	1934-38 average	1947	1934-38 average	1948	1949
	Mil. lb.	Mil. lb.	Mil. lb.	Percent	Percent	Mil. lb.	Mil. lb.	Mil. lb.
Flue-cured	324.9	400.1	342.7	105	86	68.0	61.7	77.4
Burley	11.6	43.0	23.4	202	54	3.4	3.0	8.5
Maryland	5.5	6.3	7.8	142	124	1.8	1.0	2.9
Va. fire-cured	9.7	7.6	7.7	79	101	3.1	1.7	.7
Ky. and Tenn.	53.7	21.3	19.9	37	93	15.7	3.0	5.5
One Sucker	.7	2.0	1.2	171	60	.1	.3	1.0
Green River	3.0	1.5	.8	27	53	1.1	.1	.3
Black Fat, etc.	9.0	4.9	5.1	57	104	2.1	1.2	1.5
Cigar	1.3	6.2	6.1	469	98	.2	1.2	9.2
Perique	.1	.1	.1	100	100	1/	1/	1/
Stems, tr., scrap	17.8	14.2	11.9	67	84	4.7	3.8	1.4
Total unmfd.	437.3	507.2	426.7	98	84	100.2	77.0	108.4
Country of destination:								
United Kingdom	213.9	198.0	166.9	78	84	37.4	18.1	5.0
France	21.0	10.2	.7	3	7	8.4	.1	.1
Belgium-Luxembourg	15.5	19.9	18.0	116	90	3.6	3.8	2.2
Netherlands	15.6	55.9	23.5	151	42	4.4	5.3	7.1
Germany	12.8	3.1	26.4	206	852	2.8	.2	36.7
Portugal	4.8	6.9	11.7	244	170	1.2	3.9	3.5
Denmark	4.6	10.1	10.1	220	100	.8	1.4	6.7
Ireland	7.4	15.5	12.2	165	79	1.7	1.1	4.3
Switzerland	3.8	10.9	15.3	403	140	1.0	4.6	3.2
Norway	4.7	6.9	11.1	236	161	.9	2.9	.7
Sweden	7.2	16.6	11.0	153	66	1.9	.9	.6
Italy	1.1	23.3	4.5	409	19	.2	.0	1.6
China	48.2	39.8	28.5	59	72	13.2	9.6	1.8
Australia	18.4	24.3	16.0	87	66	4.9	9.6	7.8
India	2.6	11.4	10.1	388	89	.6	2.1	3.5
New Zealand	2.5	5.3	3.9	156	74	.7	.9	1.6
Other countries	53.2	49.1	56.8	107	116	16.5	12.5	22.0
Total	437.3	507.2	426.7	98	84	100.2	77.0	108.4

1/ Less than 50,000 pounds.

The first-quarter shipments of each export classification gained over those of the 1948 period, except for Virginia fire-cured and Perique. Flue-cured, with 77 million pounds, accounted for 71 percent of total tobacco shipments from the United States followed by cigar leaf and Burley, with about 8 percent each. The first-quarter gain of flue-cured over January-March of last year was 25 percent, while Burley exports were more than 2 3/4 times those in the same period in 1948. Shipments of cigar tobacco during January-March 1949 were 50 percent more than were shipments during the whole year in 1948. Exports of Maryland, One Sucker, and Green River during January-March 1949 were each approximately 3 times those of the same months in 1948. Kentucky and Tennessee fire-cured exports exceeded those of the first quarter of 1948 by more than 80 percent, while exports of Virginia fire-cured dropped nearly 60 percent.

The great bulk of British purchases--from United States stocks last May and from the 1948 crop--had been exported by December 1948. Therefore, first-quarter shipments of United States tobacco to the United Kingdom in 1949 were only 5 million pounds; they were less than a third of those in the same months of 1948. Exports to France in early 1949 continue to be negligible as was the case during all of 1948. The largest quantity going abroad during January-March 1949, to any single country, was the 37 million pounds that went to Germany. Tobacco exports from the United States to the Netherlands, Denmark, Ireland, Italy, India, and New Zealand were considerably higher during January-March 1949 than in the same months of 1948. On the other hand, those to Belgium-Luxembourg, Portugal, Switzerland, Norway, Sweden, and Australia were lower. Exports to China have been seriously affected by the internal war and the unsettled conditions there. The United States tobacco exports to China in January-March 1949 were less than one-fifth of the exports of the same period in 1948, and only a little more than one-eighth of the 1934-38 average for those months. Before the war, China was the second ranking importer of United States tobacco.

Algeria got much larger quantities of tobacco from the United States in the first quarter of 1949 than during the whole preceding year. Tunisia and Egypt got substantially more in the first quarter of 1949 than in the first quarter of 1948.

Although exports of United States tobacco to the United Kingdom were lower in 1948 than in any peacetime year back to 1932, they still accounted for nearly two-fifths of the total shipped from this country. During 1934-38, the United Kingdom was the destination of almost one-half of the tobacco exported from the United States. In 1948, the other countries of western Europe combined, got about one-third of the total exports of tobacco from United States. This was about 50 percent more than the 1934-38 average exports of tobacco from the United States to these countries. In the prewar period, between one-fifth and one-fourth of United States tobacco exports went to this group of western European countries.

British Tobacco Consumption

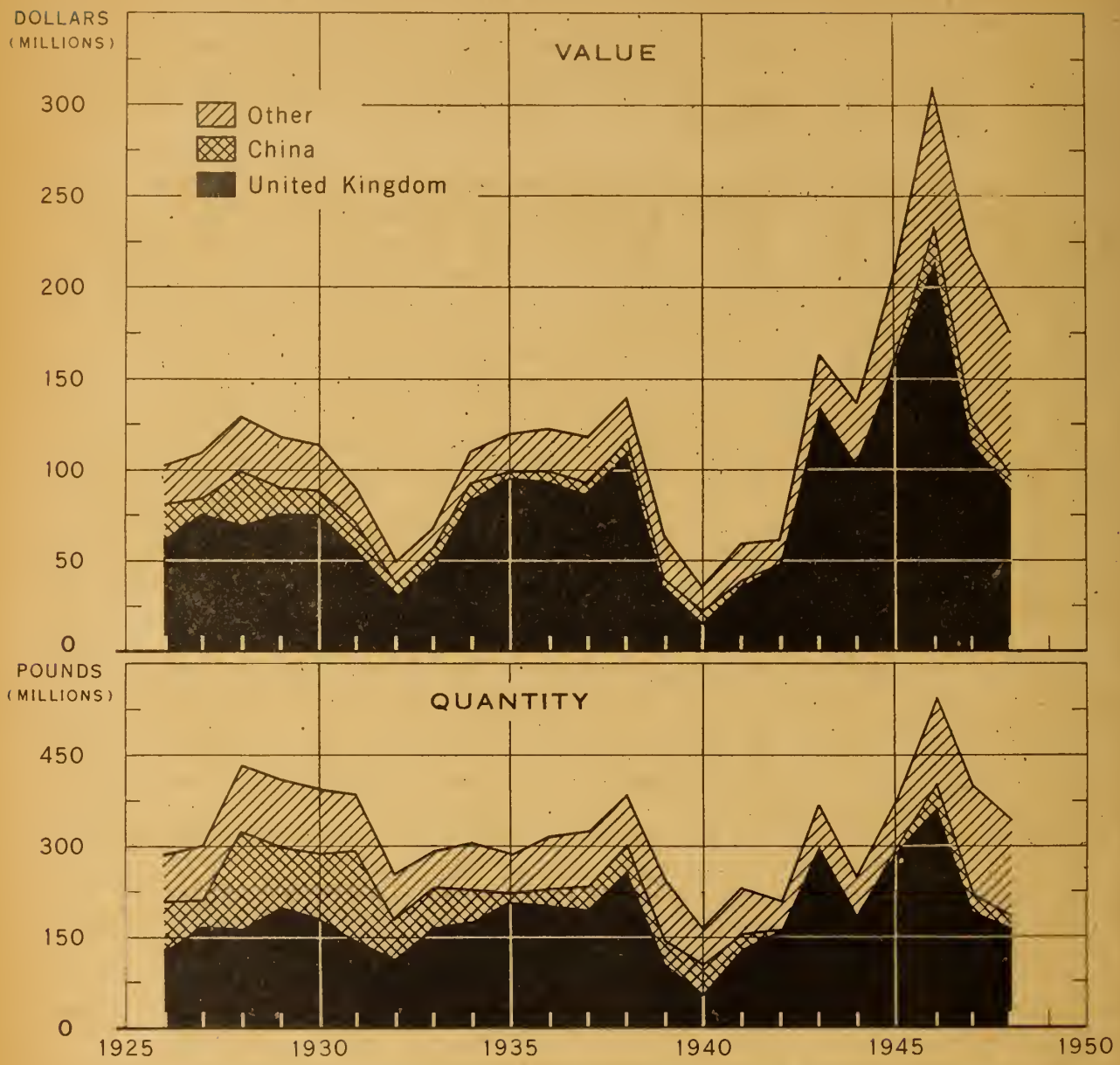
British stocks of tobacco at the end of the year 1948 were 391 1/2 million pounds, compared with 384 million pounds a year previous. Stocks have been held to much lower levels than in the 1935-39 period when the year-end average was 511 million pounds. At the end of February, British tobacco stocks were a little over 385 million pounds, nearly 6 1/3 million pounds below December 31 stocks.

Tobacco retained for British home consumption in 1948 totaled 214 million pounds compared with 225 million in 1947, and the prewar peak of 190 million in 1938. The largest home consumption in any single year occurred during the war when, in 1942, 233 million pounds were consumed. During 1948, British home consumption of tobacco from non-preferential areas, which includes the United States, was 153 million pounds--20 million pounds less than in 1947 but 8 million more than 1938. British use of tobacco from areas that have the preferential duty was 61 million pounds in 1948--9 1/2 million pounds greater than in 1947 and 15 million pounds above 1938. During January-February 1949, British home consumption of tobacco from preferential areas was 34 percent of the total compared with 27 percent in the same 2 months of 1948. United Kingdom also exports substantial quantities of manufactured tobacco. During the first quarter of 1949, Britain exported 12 3/4 million pounds of manufactured tobacco, 10 percent more than in the first quarter of 1948, principally cigarettes.

Both the preferential and non-preferential duty rates on imports of tobacco into Britain are much higher than prewar. The present duty on tobacco from preferential areas is only 2 2/3 percent lower than the full duty rate. During the last 2 years, the effort by the British to conserve dollars has been the principal influence in directing tobacco purchases to producing areas that will accept sterling in payment. With the exception of Canada, the preferential countries that usually supply the United Kingdom with tobacco are in the sterling group. Britain's tobacco imports from Southern Rhodesia and Nyasaland were respectively 90 and 18 percent larger in 1948 than in 1947, but those from India were just about the same in both years. Those from Canada dropped sharply from the record level of 1947. During the first 3 months of 1949, Britain's tobacco imports from Southern Rhodesia and Nyasaland were running well below the same months in 1948; but those from India and Canada were much higher than in January-March 1948.

Sterling can be used also in purchasing tobacco from the non-preferential countries such as Turkey and Greece. Substantial quantities of Turkish tobacco were imported by Britain in late 1948 and early 1949. In the 5 months ending with March 1949, 23 1/4 million pounds of tobacco were imported by Britain from Turkey. This is many times the usual quantity imported from Turkey. From 1925 to 1940, in only 1 year were more than 1 million pounds imported, although in 2 war years (1941 and 1944) as much as 5 to 6 million pounds came into Britain from Turkey.

EXPORTS OF FLUE-CURED TOBACCO FROM THE UNITED STATES, 1926-48



FROM 1926 TO 1928 ADDITIONAL SMALL QUANTITIES OF FLUE-CURED EXPORTED UNDER "OTHER LEAF" CLASSIFICATION

U.S. DEPARTMENT OF AGRICULTURE NEG 46329 BUREAU OF AGRICULTURAL ECONOMICS

United States exports of flue-cured tobacco in 1948 totaled 343 million pounds (export weight) and were valued at 176 million dollars. The quantity and value dropped 14 and 20 percent, respectively, from 1947 and were sharply lower than the record levels of 1946.

United States exports of flue-cured tobacco to the United Kingdom and China in 1948 were substantially less than the 1934-38 annual average. However, since United States flue-cured exports to all other foreign outlets were nearly double the prewar average, the total quantity shipped abroad was 5 1/2 percent more than the 1934-38 average. The declared value of United States flue-cured exports in 1948 was 45 percent above the 1934-38 average. Germany, Australia, Netherlands, Ireland, Belgium, and India were among the important foreign takers of United States flue-cured in 1948.

The 1949 exports of United States flue-cured are expected to exceed last year. The United Kingdom has indicated that larger purchases will be made in 1949 than 1948.

Table 3.- United States exports of flue-cured tobacco, quantity and value, 1926-48

Year	Quantity (declared weight)				Value			
	United Kingdom	China	All other	Total	United Kingdom	China	All other	Total
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil.dol.	Mil.dol.	Mil.dol.	Mil.dol.
1926 1/	126.0	82.7	78.6	287.3	60.7	20.2	21.7	102.6
1927 1/	166.7	45.4	90.3	302.4	75.6	8.7	24.9	109.2
1928 1/	162.3	159.7	112.9	434.9	69.3	29.4	30.2	128.9
1929	200.0	99.5	111.3	410.8	75.9	13.5	27.5	116.9
1930	180.0	108.9	108.8	397.7	75.4	13.7	24.3	113.4
1931	145.3	148.6	94.4	388.3	56.5	14.8	17.7	89.0
1932	111.9	68.6	74.8	255.3	30.1	7.2	11.9	49.2
1933	165.7	69.3	62.9	297.9	47.1	9.3	11.3	67.7
1934	175.4	53.5	77.1	306.0	83.3	8.9	17.2	109.4
1935	208.7	15.8	65.1	289.6	95.6	3.1	20.5	119.2
1936	200.3	30.5	85.1	315.9	93.7	5.9	23.3	122.9
1937	196.7	36.6	94.4	327.7	85.8	6.2	26.0	118.0
1938	254.0	46.7	84.5	385.2	109.1	6.2	23.9	139.2
1939	107.9	39.8	98.3	246.0	33.9	5.6	23.6	63.1
1940	57.3	51.0	58.9	167.2	14.6	7.3	13.2	35.1
1941	129.3	25.8	77.8	232.9	35.1	3.8	19.8	58.7
1942	163.8	.0	48.3	212.1	47.3	.0	14.3	61.6
1943	298.7	.0	69.8	368.5	134.2	.0	28.9	163.1
1944	186.4	.0	65.0	251.4	103.3	.0	32.9	136.2
1945	289.2	.6	87.6	377.4	160.4	.1	50.0	210.5
1946	361.0	45.0	139.7	545.7	212.8	19.2	76.0	308.0
1947	193.1	28.2	178.8	400.1	114.5	13.6	92.0	220.1
1948	165.7	18.9	158.1	342.7	89.5	7.6	79.2	176.3

1/ From 1926 to 1928, additional small quantities of flue-cured exported under "other leaf" classification.

Bureau of Agricultural Economics. Compiled from the Department of Commerce data.

The total personal expenditure in Britain for tobacco products in 1948 was about the equivalent 3/ of 3.1 billion dollars, compared with close to 2.8 billion dollars in 1947. The higher import duty rates that were in effect in 1948 necessitated a larger outlay by smokers even though they purchased a smaller quantity of tobacco products than in 1947. Expenditures on tobacco products in the United States during 1948 were about 4.0 billion dollars compared with 3.8 billion in 1947, and a larger quantity of tobacco was consumed. In 1948, British purchasers spent about 9.4 percent of their disposable personal income on tobacco products; while in the United States, purchasers spent about 2.1 percent of disposable personal income on tobacco products.

3/ British pound sterling converted to dollar equivalent at the rate of $4.03 in 1947 and 1948, and $4.89 in 1938.

The British Government revenues from tobacco customs and excises amounted to about the equivalent 3/ of 2.4 billion dollars in 1948 compared with 2.2 billion dollars in 1947 and only .4 billion dollars during 1938. During the fiscal year April 1948-March 1949, British Government receipts from tobacco comprised 16 1/2 percent of total tax revenue. During the 1949-50 fiscal year, the estimated receipts from tobacco, according to the Government Budget presented to the Parliament in April, will be 3 1/2 percent higher than in 1948-49.

In the United States also tobacco provides large revenues, which for the 1948-49 fiscal year are estimated at close to 1 3/4 billion dollars (this includes amounts collected by States but not by municipalities that tax tobacco products). Tax and customs receipts from tobacco products to the United States Government during the 1948-49 fiscal year are estimated at 3 1/2 percent of total tax receipts (excluding employment taxes). Tax receipts from tobacco products to State Governments during the 1948-49 fiscal year is estimated to account for between 5 and 6 percent of total State tax collections (excluding employment taxes). For Federal and State Governments combined, tobacco taxes and customs receipts will probably amount to around 3 3/4 percent of total tax revenues (excluding employment taxes) in fiscal year 1948-49, compared with the 16 1/2 percent in the case of Britain.

IMPORTS

United States imports of tobacco for consumption in 1948 totaled 84 million pounds--representing a 7 percent drop from 1947; but the total is 28 percent larger than the 1934-38 average and imports during the first quarter of 1949 increased 12 percent over the first quarter of 1948.

Cigarette leaf, usually referred to as Turkish or Oriental, made up three-fourths of the 1948 total imports. The proportion in 1934-38 was two-thirds of the total. Imports of cigarette leaf gained 11 percent in January-March 1949 over January-March 1948. The principal suppliers, Turkey and Greece, each shipped more to the United States than in the first quarter of 1948. Tobacco imports from Greece during January-March 1949 were up 56 percent over January-March 1948 but were still considerably lower than the comparable prewar average. Tobacco imports from Bulgaria were lower than in the first quarter of 1948, while most other smaller suppliers showed increases. Because of the anticipated continuation of high-level cigarette manufacture during 1949, United States imports of cigarette leaf are expected to approximate the 1948 total.

Next to cigarette leaf, cigar tobacco composes most of the remaining tobacco imports entering the United States. The preponderant share of the cigar tobacco imported from foreign countries comes from Cuba and is used for cigar fillers. In addition, substantitl quantities of tobacco for cigar fillers are shipped from the United States possession, Puerto Rico. The January-March tobacco imports from Cuba were the same as January-March a year ago, but tobacco shipments from Puerto Rico to the United States were almost one-fifth smaller. The quantities of wrappers being imported from the Netherlands Indies continue small compared with prewar quantities originating in that area.

3/ British pound sterling converted to dollar equivalent at the rate of $4.03 in 1947 and 1948, and $4.89 in 1938.

Table 4.- United States imports for consumption of unmanufactured tobacco, from principal supplying countries and shipments from Puerto Rico, for specified periods

(declared weight)

Classification and country of origin	Calendar year			1948 as a percentage of		January-March		
	1934-38 average	1947	1948	1934-38 average	1947	1934-38 average	1948	1949
	Mil.lb.	Mil.lb.	Mil.lb.	Percent	Percent	Mil.lb.	Mil.lb.	Mil.lb.
Total imports 1/	66.0	90.4	84.2	128	93	14.7	20.6	23.1
Cigarette leaf								
Unstemmed	44.4	58.8	64.1	144	109	10.5	14.9	16.5
Turkey	18.2	42.6	45.3	249	106	4.1	10.8	11.2
Greece	18.8	6.7	8.1	43	121	4.6	1.8	2.8
Syria	.5	3.1	4.5	900	145	.1	.8	1.0
Bulgaria	.6	2.7	2.3	383	85	.2	.6	.4
U. S. S. R.	.1	1.7	2.0	2,000	118	2/	.4	.5
So. Rhodesia	2/	1.2	1.3	---	108	2/	.3	.3
Yugoslavia	.0	.5	.5	---	100	.0	.1	.1
Cigar leaf (filler)								
Stemmed	7.2	16.0	10.8	150	68	1.8	2.6	2.8
Cuba	7.1	15.9	10.8	152	68	1.7	2.5	2.8
Unstemmed	4.1	5.9	4.1	100	69	1.1	1.6	.9
Cuba	4.1	5.8	4.0	98	69	1.1	1.5	.9
Scrap	5.2	7.7	3.8	73	49	1.3	.9	1.1
Cuba	2.9	6.7	3.7	128	55	.8	.8	1.1
Philippines	2.3	1.0	.1	4	10	.5	.0	.0
Cigar wrapper	2.7	1.4	1.0	37	71	.4	.3	.2
Netherlands I.	3/ 1.9	1.0	.8	42	80	.4	.2	.1
Philippines	.6	.0	.0	---	---	.0	.0	.0
Cuba	.2	.3	.2	100	67	2/	.1	.1
Total from Cuba	14.3	28.7	18.7	131	65	3.6	4.9	4.9
			Shipments from Puerto Rico					
Total	22.5	15.1	15.2	68	101	5.5	5.2	4.2
Stemmed	17.4	10.0	9.6	55	96	4.4	3.9	2.6
Unstemmed	.1	.1	2/	100	---	2/	2/	.3
Scrap	5.0	5.0	5.6	112	112	1.1	1.3	1.3

1/ Includes tobacco stems, not cut, ground, or pulverized, not shown separately.
2/ Less than 50,000 pounds.
3/ Netherlands Indies tobacco shipped as Netherlands.

FLUE-CURED, TYPES 11-14

Prospective Acreage
Above Last Year

The prospective acreage as indicated by farmers' intentions on March 1 is placed at 931,700 acres of flue-cured tobacco, nearly 5 1/2 percent more than the 883,800 acres harvested last year. This is 97 percent of the national acreage allotment for 1949. The 1949 national marketing quota was increased over 1948, and allotments on most farms are close to 5 percent more than in 1948. Most of the flue-cured areas showed about the same relative increase of 5 or 6 percent over last year's acreage, but that part of the Old Belt, type 11, in Virginia showed an increase of 8 percent.

During the last 3 seasons, 1946-48, yields of flue-cured per acre averaged about 1,170 pounds. The 1949 yield per acre probably wlll be near recent averages if the generally favorable growing conditions continue. The 1948 average yield was a record--1,233 pounds per acre. If famers' intentions are carried out, and assuming an average yield of 1,170 pounds per acre, the 1949 crop would approximate 1,090 million pounds. This would be practically the same as last year's production of flue-cured but would be considerably smaller than the large 1946 and 1947 crops. Such a production would be well above the prewar and early war years, however, with the exception of 1939.

Table 5.- Flue-cured tobacco: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-48

(farm-sales weight)

Year	Production	Stocks July 1	Total supply	Disappearance year beginning July 1	Average price per pound
	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Cents
Average 1934-38	741.0	844.9	1,585.9	704.3	22.9
1939	1,170.9	946.3	2,117.2	707.5	14.9
1940	759.9	1,409.7	2,169.6	576.7	16.4
1941	649.5	1,592.9	2,242.4	782.9	28.1
1942	811.7	1,459.5	2,271.2	892.4	38.4
1943	790.2	1,378.8	2,169.0	980.2	40.2
1944	1,087.3	1,188.8	2,276.1	1,149.8	42.4
1945	1,173.5	1,126.3	2,299.8	1,152.4	43.6
1946	1,352.0	1,147.4	2,499.4	1,212.6	48.3
1947	1,317.5	1,286.8	2,604.3	1,054.1	41.2
1948 1/	1,089.6	1,550.2	2,639.8	.	49.6

1/ Preliminary.

Domestic Consumption High
Exports Increase

During the July 1948-June 1949 marketing year, domestic use of flue-cured is expected to be near 710 million pounds compared with 695 million pounds in the previous year. The 15-million-pound increase would be in line with the larger consumption of cigarettes in the United States. The 1948-49 domestic use of flue-cured is likely to be the highest on record and will be more than double the prewar average. Flue-cured exports during 1948-49 may be 400 million pounds or higher (farm-sales weight), compared with the 1947-48 total of 359 million pounds. During the 9 months ended with March 1949, flue-cured exports were running 18 percent higher than in the same period of the preceding year. The substantial shipments to Germany occurred in this period and bolstered the relative increase above that expected for the marketing year as a whole. Netherlands, Belgium-Luxembourg, Sweden, and Australia got smaller quantities in July 1948-March 1949 than in the comparable period of the preceding year, but quantities to the United Kingdom were larger since they included much of that purchased in May 1948 from United States stocks.

Domestic use plus exports, or total disappearance, during July 1948-June 1949 will approximate 1,110 million pounds, about 56 million pounds greater than in the previous year. A disappearance of this magnitude would result in a carry-over on July 1, 1949, of about 1,530 million pounds compared with 1,550 million pounds a year earlier. However, the July 1, 1949, stocks will be well above those of any other previous year, except 1941. If 1949 flue-cured production is 1,090 million pounds--1946-48 average yields on the 1949 prospective acreages. the total supply for the 1949-50 marketing year would be 2,620 million pounds, second only to the record supply of 2,640 million pounds for 1948-49.

An active demand for the 1949 crop is expected. Cigarettes are the principal outlet for flue-cured, and their consumption in this country is likely to continue high even if there should be some moderate decline in personal income. The foreign demand may be stronger than last season because of the anticipated larger British purchases and the substantial aid toward recovery rendered by the Economic Cooperation Administration throughout western Europe. A considerable quantity of United States tobacco is normally imported by countries that are benefiting from ECA assistance. The world-wide growth in cigarette smoking is continuing and will favor an increasing use of flue-cured tobacco.

Price Supports
to be Lower

The level of price support for the 1949 flue-cured crop will be lower than last season. Rates for support loans are based on 90 percent of parity, as of June 15. The parity price of flue-cured computed as of April 15, 1949, was 47.2 cents, or 3¼ percent below last June when it was 48.8 cents. This reflected the decline from the high point in the middle of 1948 of the index of prices paid by farmers for items used in production and family living. The 1948 loan level was 43.9 cents per pound. Ninety percent of the April parity for flue-cured is 42.5 cents. Some further decline in the prices-paid index from April to June would mean a loan level for the 1949 season a little lower than 42.5 cents.

The 1949 average price for flue-cured may be below last year's record of 49.6 cents per pound, but auction prices are expected to average moderately higher than the loan level during the season.

The quantities of tobacco placed under Government loan in the 1948 marketing season were far less than in the 1947 season. As of April 30, the stocks of flue-cured under Government loan totaled about 144 million pounds (farm-sales weight). This represents about 35 percent of the flue-cured placed under loan during the last three seasons.

BURLEY, TYPE 31

Prospective Burley Production Below Last Year's Near Record

The prospective acreage as indicated by farmers' intentions on March 1 is placed at 434,400 acres of Burley, slightly above the 432,000 acres harvested last year. This intended acreage is about 93 percent of the total allotment. The total allotment for 1949 was slightly above that established for 1948. The 1949 Burley acreage is well below the large acreages grown from 1944 and 1946 but exceeds the 1934-38 average by 25 percent. The 1948 average yield of 1,396 pounds per acre was exceptionally high and set a new record. If the average yield in 1949 is the same as the average for the last 3 years, that is, about 1,265 pounds per acre--and if the prospective acreage is harvested, the 1949 crop of Burley would be 550 million pounds compared with 603 million in 1948. Last year's crop was the second highest on record, being exceeded only by the 614-million-pound 1946 crop.

Table 6.- Burley tobacco: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-48

(farm-sales weight)

Year	Production	Stocks October 1	Total supply	Disappearance year beginning October 1	Average price per pound
	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Cents
Average 1934-38	287.2	700.9	988.1	314.5	22.2
1939	395.3	684.1	1,079.4	317.1	17.3
1940	376.6	762.3	1,138.9	340.8	16.2
1941	336.8	798.1	1,134.9	379.6	29.2
1942	343.5	755.3	1,098.8	412.8	41.8
1943	392.1	686.0	1,078.1	426.9	45.6
1944	590.6	651.2	1,241.8	482.8	44.0
1945	577.2	759.0	1,336.2	482.9	39.4
1946	614.0	853.3	1,467.3	526.5	39.7
1947	484.7	940.8	1,425.5	523.2	48.5
1948 1/	602.9	902.3	1,505.2		46.0

1/ Preliminary.

Burley Consumption High

The largest outlet for Burley is in cigarette manufacture. The continued high rate of cigarette output makes likely a domestic use of 505 million pounds of Burley during the October 1948-September 1949 marketing year, compared with 496 million in the preceding year. Considerable quantities of Burley are also used in smoking and chewing tobacco. Total consumption of smoking and chewing during the first 7 months of the marketing year (October 1948-April 1949) was about 4 percent below the same period a year earlier. The manufacture of smoking tobacco during the current marketing year may take nearly the same quantities of Burley as a year earlier, but use in plug chewing will probably be down a little.

Exports of Burley tobacco from October 1948 to March 1949 totaled 18 million pounds (farm-sales weight) and were 5 3/4 million pounds larger than in the same months of 1947-48. In the 6 months ended with March 1949, Denmark and Portugal took much larger quantities and Norway also took more, compared with the same 6 months a year earlier. Shipments to the Netherlands were sharply lower, and those to Belgium fell off slightly. Around 6 1/2 million pounds (farm-sales weight) however, went to Germany, whereas no Burley was shipped to Germany in the same 6 months of the 1947-48 marketing year. It seems probable that Burley exports may be 28 million pounds in 1948-49. Exports of this size would be second only to those of 1946-47, when 50 million pounds (farm-sales weight) were shipped.

Total disappearance of Burley, including domestic use and exports during the current marketing year probably will be around 540 million pounds compared with the 523 million disappearance in 1947-48. The disappearance of 540 million pounds in 1948-49 would result in a carry-over of approximately 965 million pounds on October 1, 1949, or 7 percent more than October 1, 1948. This would be the highest carry-over at the beginning of any marketing year. If the crop outturn in 1949 is 550 million pounds--the 1946-48 average per acre yield on the prospective acreage--total supply will be 1,515 million pounds for the 1949-50 marketing year. The increase in carry-over seems likely to more than offset the decrease in production; and the total supply may be 10 million pounds above that for 1948-49 or an increase of less than 1 percent. The total supply of Burley for 1948-49 exceeded that for any prior year.

1948 Burley Price
Second Highest on Record

Despite the large size of the 1948 Burley crop, the season average price was 46.0 cents per pound--second only to the 48.5-cent average of the 1947 season, when a smaller crop, but of excellent quality, was sold. This was a decline of only 5 percent. The price-support level for the 1948 crop was 42.4 cents per pound, and approximately 97 million pounds were placed under Government loan. About three-fourths of the Government loan stocks of the 1946 and 1947 Burley crops has been sold. Total Government loan stocks of Burley as of April 30 were about 143 million pounds (farm-sales weight).

The loan rate for the 1949 crop will probably be lower than for the 1948 crop because of the decline in parity prices. The Burley loan level is determined on the basis of 90 percent of the Burley parity as of September 15. The index of prices paid by farmers for items used in living and production in April 1949 was 3 percent lower than it was last September. The parity price of Burley as of April 15 was 45.7 cents per pound, and 90 percent of this is 41.1 cents, or 1.3 cents less than the 1948 season's loan level. Between April and September, some further moderate decline in the prices-paid index seems probable; and both Burley parity and 90 percent thereof will reflect the same percentage decline as the prices-paid index. The Burley loan level for the 1949 crop seems likely to be about 5 or 6 percent lower than that for the 1948 crop.

Demand for Burley in the season ahead is not expected to be so strong as in the last 2 seasons but will probably maintain the average market price above the loan level. Procurement of Burley leaf to meet the requirements for steady and high cigarette consumption will be the major factor supporting the demand.

MARYLAND, TYPE 32

Larger Prospective Acreage in 1949

The prospective acreage as indicated by Maryland growers as of March 1 was placed at 48,000 acres of tobacco in 1949, an increase of 3 percent over the 46,600 acres harvested in 1948. The 1949 production of Maryland is not under marketing quota and so, no acreage allotments are in effect. The 1949 prospective acreage is higher than any previous year's harvested acreage, except for 1946 when it was 50,000 acres. The 1924-28 average was 31,000 acres, the 1934-38 average was close to 37,000 acres, and the 1944-48 average was nearly 45,000 acres.

If the yield in 1949 is equal to the 1944-48 average of about 770 pounds per acre and if the expected acreage is harvested, the total production of Maryland, type 32, tobacco in 1949 would be close to 37 million pounds, compared with 35 million pounds in 1948. Such a production total would be above that of any year before 1944, but it has been exceeded 3 times in the years since 1944.

Total Use High in 1948

The marketing year for Maryland, type 32, tobacco coincides with the calendar year following the year in which it was produced. During 1948, the domestic use of Maryland tobacco was 27 1/2 million pounds, slightly larger than in 1947 and about 7 million pounds above the 1934-38 average. Domestic use of this type is largely in cigarettes, which set a new output record in 1948. Cigarette consumption is expected to remain high during 1949 and domestic use of Maryland during the year is expected to be around 28 million pounds.

Table 7.- Maryland tobacco: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-48

(farm-sales weight)

Year	Production	Stocks January 1 of following year	Total supply	Disappearance year beginning Jan. 1 of the following year	Average price per pound
	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Cents
Average 1934-38	27.5	38.4	65.9	27.5	19.7
1939	32.8	36.3	69.1	25.9	21.1
1940	32.6	43.2	75.8	30.8	33.0
1941	31.2	45.0	76.2	28.5	30.1
1942	28.1	47.7	75.8	32.0	56.5
1943	20.8	43.8	64.6	27.0	45.3
1944	38.2	37.6	75.8	29.3	55.5
1945	18.4	46.5	64.9	32.5	57.0
1946	46.2	32.4	78.6	33.8	44.5
1947	37.8	44.8	82.6	35.7	42.8
1948 1/	35.0	46.9	81.9		

1/ Preliminary.

Exports of Maryland during 1948 were 8.2 million pounds (farm-sales weight)--a 24 percent increase over 1947. Those to Switzerland increased 70 percent over 1947 and accounted for nearly three-fourths of the total in 1948. French Morocco, Tunisia, and Algeria also took more, and shipments to Belgium were larger. Germany got more than one-half million pounds, in 1948, but none in 1947. Maryland exports to the Netherlands fell sharply and France took none, although a year earlier, the shipments to France were nearly one-half million pounds. In the first quarter of 1949, exports of Maryland tobacco totaled 3 million pounds (farm-sales weight) compared with a little more than 1 million pounds in January-March 1948. The largest quantities went to Switzerland, Germany, French Morocco, and Tunisia. Exports for the entire year of 1949 are expected to be around 8 1/2 million pounds, (farm-sales weight) or slightly above last year.

Total disappearance of Maryland during 1949, including both domestic use and exports, may approximate 36 1/2 million pounds or nearly a million more than in 1948. Assuming this disappearance, the carry-over on January 1, 1950, would be nearly 45 1/2 million pounds--about 1 1/2 million pounds below January 1, 1949. If 1949 production is 37 million pounds -- 1944-48 average yield on prospective acreage--the total supply for 1950 would be 82 1/2 million pounds. This total supply figure would be slightly above that for 1949 and would practically equal that for 1948, which was higher than any previous year.

Prices for 1948 Maryland Crop
Above Previous Season

The auction markets for the 1948 Maryland tobacco crop opened on May 10. The bidding during the first 2 weeks of sales has been active and the average price for sales through May 23 was 52.2 cents compared with 42.7 cents for the sales during the comparable period in May last year. Early marketings this season were large and through May 23 approximately 9 million pounds were auctioned compared with 5 million pounds in the same number of days in May a year ago.

The Government price-support program is in operation on the Maryland auction markets this season. As provided in the law, the loan level is based on 90 percent of the Maryland tobacco parity; and on September 15, 1948, this computed to 43.9 cents per pound. For the 1947 crop growers received an average of 42.8 cents per pound which was the lowest season average price for Maryland tobacco since the 1941 crop. The 1948 crop is expected to bring a season average higher than the support level and several cents above last season's average. The quality of the crop is reported generally high, with good smoking qualities.

In addition to auction sales approximately 1 1/2 million pounds of Maryland tobacco were received by the Baltimore hogshead market through May 20.

FIRE-CURED, TYPES 21-24

1949 Prospective Acreage Down

The prospective acreage as indicated by reports of farmers' intentions on March 1 is placed at 57,000 acres, 9 percent less than last year's harvested acreage of 62,600. Each of the fire-cured types 21-23 showed about the same relative decrease from last year's harvested acreage, but the decline of type 22 acreage in Tennessee was 12 percent and type 22 acreage in Kentucky dropped 4 percent. The fire-cured tobacco allotment for 1949 was 15 1/2 percent smaller than the 1948 allotment; in view of the 9 percent decline in expected acreage, it is apparent that growers will be planting closer to the full allotment than last year. Growers have tended to plant somewhat below the allotments. The 1948 harvested acreage was about 81 percent of the total allotment, while the 1949 prospective acreage is 87 percent of the total allotment.

If the expected acreage is harvested and if yields are equal to the 1946-48 average, which is close to 1,130 pounds per acre, the total fire-cured production would be around 64 million pounds. This would be 12 percent less than the 1948 production and smaller than any previous fire-cured crop except 1945.

Exports up Moderately,
Supplies Ample

The major domestic outlet for fire-cured tobacco is in manufacture of snuff. Thus far, in the 1948-49 marketing year, the manufacture and consumption of snuff has been about equal to that of the same period in the 1947-48 marketing year. But during January-April 1949, snuff consumption was down a little from early 1948, and it is estimated that

domestic use of fire-cured during the entire marketing year, October 1948-September 1949, will be around 35 million pounds compared with 36 million in 1947-48. Exports of fire-cured, including fire-cured leaf in Black Fat during the first half of the marketing year amounted to 17 million pounds (farm-sales weight) or 25 percent more than in the same period of the preceding year. Exports of Kentucky and Tennessee fire-cured were running well above the same period in each of the previous 2 marketing years, but those of Virginia fire-cured were smaller. The Netherlands and Denmark took substantially greater portions of Kentucky-Tennessee fire-cured than a year ago but Switzerland took less. Norway, Sweden, Switzerland, the Netherlands, and Belgium-Luxembourg, took smaller quantities of Virginia fire-cured in the 6 months ending with March 1949 than in the same period of the prior year. Shipments to Germany were considerable for both kinds of fire-cured. For the entire marketing year 1948-49, exports including fire-cured leaf in Black Fat are estimated at 35 million pounds (farm-sales weight) or 17 percent more than the 30 million pounds exported in 1947-48.

Table 8.- Fire-cured tobacco: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-48

(farm-sales weight)

Year	Production	Stocks October 1	Total supply	Disappearance year beginning October 1	Average price per pound
	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Cents.
Total types 21-24					
Average 1934-38	110.2	194.2	304.4	123.0	10.2
1939	99.4	136.2	235.6	94.0	10.6
1940	106.5	141.6	248.1	64.2	9.5
1941	69.7	183.9	253.6	69.0	14.1
1942	71.5	184.6	256.1	76.3	17.1
1943	64.9	179.8	244.7	71.2	23.4
1944	66.1	173.5	239.6	107.8	24.5
1945	58.3	131.8	190.1	85.2	31.5
1946	108.9	104.9	213.8	70.4	26.0
1947	85.8	143.4	229.2	66.6	29.5
1948 1/	73.2	162.6	235.8		31.9

1/ Preliminary.

Total disappearance of fire-cured, including domestic use and exports, in the current marketing year will apparently approximate 70 million pounds compared with 66 1/2 million in 1947-48 and 70 1/2 million in 1946-47. Though higher than in the previous year, the disappearance in 1948-49 is substantially less than the years before 1940. With a disappearance of 70 million pounds, the carry-over on October 1, 1949, would be 166 million pounds, 3 million above a year earlier, and the highest for any October 1 since 1944. If a 64-million-pound crop (1946-48 average yields on the prospective acreages) is harvested in 1949 and is added to expected carry-over, the total supply for 1949-50 would be 230 million pounds, or 6 million pounds less than that for 1948-49.

1949 Price Supports

The level of price support for fire-cured tobacco is related to that for Burley. The loan level for fire-cured is calculated at 75 percent of the loan level for Burley, which, in turn, is established at 90 percent of Burley parity as of September 15. Since September, Burley parity had declined 3 percent by April 15. Ninety percent of the April parity for Burley was 41.1 cents per pound, and 75 percent of that figure is 30.8 cents. This is 1 cent below the loan level that was applicable to the 1948 crop of fire-cured. Some further decline in Burley parity between April and September of this year seems likely to occur, and this would be reflected in the loan level for fire-cured.

The 1948 season average price received by growers for fire-cured tobacco was 31.9 cents, almost the same as the 1948 Government loan level. However, the 1948 season average was 8 percent above the previous season and the highest on record; the next highest season average was 31.5 cents per pound for the 1945 crop.

DARK AIR-CURED, TYPES 35-37

Smaller 1949 Acreage of One Sucker and Green River

The prospective acreages as indicated by farmers' intentions on March 1 are down from last year for each of the principal dark air-cured types--One Sucker, type 35, and Green River, type 36. Prospective acreage of type 35 on March 1 was 15,700 acres, a decrease of 3 percent; of type 36 was 9,800 acres, a decrease of almost 8 1/2 percent. These two types are produced under acreage allotments, which were reduced about 10 percent from 1948 to 1949. Expected acreage on March 1 was 85 percent of the total allotment, indicating that growers are planting closer to the full allotment than was the case in 1948. Last year's harvested acreage was 80 percent of the total allotment. Growers of Virginia sun-cured, type 37, indicated an increase from 3,000 in 1948 to 3,400 acres in 1949. The prospective 1949 acreage for types 35-37, combined, is 28,900 or 3 percent less than 1948. If the average yield in 1949 is equal to the 1946-48 annual average of about 1,145 pounds per acre, and if the expected acreage is harvested, total production of dark air-cured tobacco in 1949 would be about 33 million pounds compared with 35 million pounds in 1948. This is considerably smaller than the 44 to 50 million-pound level in the years 1944 to 1946, and below most prewar years.

Domestic Use Down Slightly, Supplies Large

Most dark air-cured tobacco is used domestically and its principal outlet is in chewing tobacco. The production of chewing tobacco during the first half of the 1948-49 marketing year was running about 4 percent below the first half of the previous marketing year. It is estimated that domestic use of dark air-cured in the entire marketing year 1948-49 will be about 25 million pounds, compared with 26 1/3 million in 1947-48. This would be lower than in any previous year except 1937, and about in line with the long-term downward trend in the consumption of chewing tobacco.

Table 9.- Dark air-cured tobacco: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-48

(farm-sales weight)

Year	Production	Stocks October 1	Total supply	Disappearance year beginning October 1	Average price per pound
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Cents
Total types 35-37:					
Average 1934-38	35.5	62.8	98.3	39.0	9.4
1939	44.2	56.1	100.3	34.7	7.3
1940	42.5	65.6	108.1	33.7	7.7
1941	31.5	74.4	105.9	41.9	12.0
1942	35.2	64.0	99.2	33.9	15.2
1943	30.0	65.3	95.3	37.6	27.2
1944	44.9	57.7	102.6	42.2	23.3
1945	43.6	60.4	104.0	43.6	25.2
1946	49.6	60.4	110.0	37.3	22.5
1947	37.2	72.7	109.9	32.7	25.8
1948 1/	34.8	77.2	112.0		28.7

1/ Preliminary.

Exports of dark air-cured during the first half of the marketing year were 4 1/2 million pounds (farm-sales weight), about two-fifths higher than in the same months a year ago. Exports of One Sucker were substantially larger, with major quantities going to French Morocco, Algeria, Tunisia, and Nigeria. The Netherlands took less One Sucker than in the first half of the 1947-48 marketing year but took considerably more Green River. The United Kingdom also took greater quantities of Green River. None was shipped to Switzerland, although in the same period of 1947-48, a fair-sized quantity went there. Exports of dark air-cured leaf in Black Fat comprise a substantial part of the exports. Exports of Black Fat, October 1948 to March 1949, were 5 percent higher than during the same months of 1947-48. Those to the Gold Coast were sharply higher whereas those to Nigeria and French West Africa declined. It is estimated that exports of dark air-cured for the entire marketing year 1948-49 will be around 7 million pounds (farm-sales weight).

Total disappearance of dark air-cured tobacco, including both domestic use and exports, will probably be close to 32 million pounds or only about three-fourths of a million pounds less than in 1947-48. This is about 7 million pounds less than the 1934-38 average. A disappearance of 32 million pounds by October 1, 1949, would leave a carry-over of 80 million pounds, 3 million above October 1948 and the highest stocks for that month since 1932. If production in 1949 approximated 33 million pounds (1946-48 average yields on the prospective acreages) and this is added to estimated carry-over, the total supply for 1949-50 would be 113 million pounds. This would be the highest since 1934, though only 1 million larger than that for 1948-49.

Lower Level of Price Support in 1949 Likely

As in the case of fire-cured, the price-support level for dark air-cured types is related to the loan level for Burley. Ninety percent of the Burley parity as of September 15 determines the loan level for Burley, and 66 2/3 percent of the Burley loan level becomes the basis for supporting the prices of the dark air-cured types. By April 15, Burley parity had declined 3 percent from the level of September 15, 1948. Ninety percent of the Burley parity for April was 41.1 cents per pound and 66 2/3 percent of this is 27.4 cents per pound or nine-tenths of a cent less than the loan level for the 1948 dark air-cured crop. Some further decline may be in prospect from April to September of this year if prices paid by farmers ease further as expected.

The season average price received by farmers for the 1948 dark air-cured crop was 28.7 cents per pound, nearly 3 cents higher than for the 1947 crop and the highest average price received for this kind of tobacco to date. The next highest average was for the 1943 crop at 27.2 cents per pound. The 1948 season average for One Sucker gained 15 percent over 1947 and Virginia sun-cured gained 12 percent while Green River showed a smaller relative increase--4 percent.

CIGAR TOBACCO

1949 Acreage Prospects for Filler About the Same, Binder Down, Wrapper Up

The prospective acreage as indicated by farmers' intentions on March 1 is placed at 39,200 acres of Pennsylvania Seedleaf in 1949--a little more than a year ago; whereas for the Ohio filler, types 42-44, an acreage of 5,600 or somewhat less than in 1948 is expected. The total prospective acreage of these continental filler types at 44,800 acres is practically the same as a year ago. The acreage of the Ohio filler types grown in the Miami Valley area, after an upturn from the low 1945 level, again resumed the long-term decline that began in the early thirties. Pennsylvania acreage remains well above the level of the thirties.

Growers of binder tobacco plan to cut 1949 acreage below that of 1948. The acreage indicated as of March 1 was 35,600 acres or approximately 10 percent less than in 1948. Producers in the Connecticut Valley and Northern Wisconsin indicated the sharpest cuts. Acreage of Connecticut Valley Broadleaf, type 51, was down a little more, relatively, than the Havana Seed, type 52. The Wisconsin types 54 and 55 indicated a 5 and 15 percent decrease, respectively. The only increase shown was in the New York and Pennsylvania Havana Seed, type 53. The increase in this type was in New York. If the drop in total acreage of cigar binder takes place this year, the acreage will be the lowest for any year since 1943, and this will be the third successive year of decline in acreage.

Table 10.- Cigar tobacco: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-48

(farm-sales weight)

Year and type	Production	Stocks October 1 1/	Total supply	Disappearance year beginning October 1 1/	Average price per pound
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Cents
Total filler types 41-44 2/					
Average 1934-38	48.9	159.9	208.8	54.4	10.4
1939	63.1	141.9	205.0	54.0	11.7
1940	64.7	151.0	215.7	58.7	12.0
1941	71.2	157.0	228.2	61.4	12.5
1942	53.8	166.8	220.6	67.0	13.2
1943	47.0	153.6	200.6	55.2	18.6
1944	58.8	145.4	204.2	61.3	19.5
1945	49.9	142.9	192.8	64.1	34.0
1946	64.4	128.7	193.1	70.9	32.8
1947	63.2	122.2	185.4	61.7	30.6
1948 3/	70.4	123.7	194.1		29.4
Total binder types 51-56					
Average 1934-38	41.8	165.1	206.9	60.5	12.5
1939	63.3	116.6	179.9	45.0	16.6
1940	67.9	134.9	202.8	66.1	14.5
1941	61.6	136.7	198.3	60.4	16.9
1942	55.2	137.9	193.1	66.4	20.4
1943	51.0	126.7	177.7	69.2	30.3
1944	57.2	108.5	165.7	63.4	30.9
1945	62.1	102.3	164.4	60.9	47.7
1946	73.8	103.5	177.3	53.6	52.7
1947	70.3	123.7	194.0	68.2	43.4
1948 3/	61.0	125.8	186.8		41.8
Total wrapper types 61-62					
Average 1934-38	8.4	11.8	20.2	9.3	78.3
1939	11.4	10.1	21.5	7.9	67.7
1940	9.5	13.6	23.1	10.4	77.6
1941	10.1	12.7	22.8	9.6	98.4
1942	9.2	13.2	22.4	9.4	132.1
1943	10.0	13.0	23.0	8.7	167.7
1944	11.3	14.3	25.6	10.9	196.1
1945	11.2	14.7	25.9	12.3	197.3
1946	12.5	13.6	26.1	12.7	234.0
1947	13.5	13.4	26.9	12.4	296.0
1948 3/	14.6	14.5	29.1		263.0

1/ Stocks and disappearance for types 56, 61, and 62 are as of July 1.
2/ A small quantity of type 45 for 1939 and 1940 not included. 3/ Preliminary.

The 1949 prospective acreage of cigar wrapper, types 61-62, as of March 1 was 15,600 acres-- a 4-percent increase over 1948 and higher than any harvested acreage on record. Both the Connecticut Valley shade-grown, type 61, and the Georgia and Florida shade-grown, type 62, indicated increases. In the years just before the war and in the early war years, the total acreage of shade-grown was around 10,000, but increases have occurred in each successive year since 1943.

The average yield per acre for the three classes of cigar tobacco during 1944-48 was as follows: filler, 1,455 pounds; binder, 1,535 pounds; and wrapper, 1,010 pounds. If the 1949 yield per acre were to approximate the 1944-48 average in each of the cigar-tobacco classes, and if the prospective acreage is harvested, the total production of filler would be 65 million pounds; of binder, 55 million pounds; and of wrapper, about 15 3/4 million pounds. Compared with the 1948 production, filler would be down about 5 million pounds or 7 percent, binder would be down 6 million pounds or 10 percent, and wrapper would be up a little more than 1 million pounds or 8 percent.

Cigar Tobacco Disappearance and Supplies

Cigar tobacco is used mostly in the manufacture of cigars but sizable quantities of some grades also go into the manufacture of scrap chewing tobacco. Scrap chewing uses mostly the lower grades of the binder types. During the first half of the October 1948-September 1949 marketing year, the production of cigars was approximately 3 percent less than in the first half of the preceding year. Scrap-chewing manufacture, on the basis of data for the 5 months ending with February, held nearly even with the same period of a year earlier.

Total disappearance of domestic cigar filler during October 1948-September 1949 is expected to be about 60 million pounds, or about 1 3/4 million pounds less than in 1947-48. Although exports of cigar filler were heavy in the first quarter of the year, this was mostly the Puerto Rican type 46, which is not included in the figures above for continental filler disappearance. If 60 million pounds of continental filler is used during October 1948 to September 1949, the carry-over on October 1 would be 134 million pounds--up 10 million pounds over last October. Total supplies for 1949-50, assuming a 1949 production of 65 million pounds, would be nearly 200 million pounds or 6 million larger than those for 1947-48. This would be the largest since 1944-45 but nearly 9 million pounds less than the 1934-38 average. On April 1, 1949, the total stocks of Puerto Rican tobacco, type 46, including both those in the United States and those in Puerto Rico, were about 57 million pounds--10 million pounds less than April 1, 1948. Puerto Rican tobacco is used mostly as cigar filler in the United States.

Total disappearance of the binder types in the 1948-49 marketing year is expected to be around 65 million pounds or about 3 million pounds less than 1947-48. This would leave a carry-over on October 1 of approximately 122 million pounds or slightly less than the carry-over on

October 1, 1948. Assuming a production of 55 million pounds in 1949 (1944-48 average yields on the prospective acreages) the total binder supplies for 1949-50 would be 177 million pounds, or nearly 10 million less than for 1948-49.

The total use of domestic wrapper types in July 1948-June 1949 is estimated at between 12.5 and 13.0 million pounds, compared with 12.4 million in 1947-48. This would leave a carry-over on July 1, 1949, of at least 16 million pounds, compared with 14½ million on July 1 of last year. Total supplies for 1949-50, assuming 15 3/4 million pounds are produced in 1949, would be nearly 32 million pounds, or about 10 percent higher than supplies for 1948-49. Such a level of supply would be well above that for any previous year since 1930. Imports of cigar wrapper from Sumatra and Java, which were considerable before the war, are still in much shorter supply than before the war but some increase is expected by 1950.

Most Prices Down for 1948 Crop Cigar Tobacco

Sales of the 1948 Pennsylvania Seedleaf crop lagged during the early months of 1949 and were insufficient, at least through April, to establish a season average price on this type. The Ohio filler, types 42-44, averaged 23 cents per pound, a sharp drop below the 31-cent average received by growers for the 1947 crop. The 1948 Connecticut Valley Broadleaf crop averaged 60.0 cents per pound compared with 51.0 cents in the previous season when the crop was damaged by pole sweat. The 1948 Connecticut Valley Havana Seed crop brought an average of 62.3 cents per pound or 10.8 cents less than the 1947 crop. Average prices for Havana Seed in Massachusetts were nearly 14 cents below the record 76 cents per pound received by growers for the 1947 crop. The selling season was marked by considerable uncertainty. The 1948 New York and Pennsylvania Havana Seed crop sold for an average of 25 cents, or about 3 1/3 cents below the previous year. The sales of Southern Wisconsin, type 54, tobacco returned to growers 22.4 cents per pound or practically the same as in the preceding season. However, the Northern Wisconsin, type 55, tobacco sold for an average of 23 cents per pound, and this was sharply lower than the approximate 35-cent average received for the 1947 crop. The 1948 shade grown crops both sold at less than they did in the previous year. Connecticut Valley, type 61, at $2.90 per pound was 20 cents lower; and the Georgia-Florida, type 62, at $2.15, was 50 cents lower than in the preceding year.

Cigar Tobacco Exports

Substantially larger than usual quantities of cigar tobacco have been exported in recent months. During the 6 months ended with March 1949, more than 11 million pounds (declared weight) were exported compared with only 3½ million in the same period of 1947-48. A substantial part was Puerto Rican, type 46. From October 1948 through March 1949, for all cigar tobacco combined, Germany was the major foreign destination taking 7 1/3 million pounds (declared weight). Denmark took an increased quantity, but the Netherlands took only about one-seventh as much as in the period of October 1947-March 1948; Belgium also took much less and Sweden took none compared with half a million pounds in the earlier period.

Table 11.- Acreage of tobacco in the United States, by types, 1934-38 average; 1948 and 1949 and percentages

Type	1934-38	1948 1/	1949 2/	Percentage change 1934-38 to 1949	Percentage change 1948 to 1949
	Thou. acres	Thou. acres	Thou. acres	Percent	Percent
Total flue-cured, types 11-14:	863.1	883.8	931.7	+7.9	+5.4
Old and Middle Belt, type 11	327.1	320.0	339.0	+3.6	+5.9
Eastern North Carolina, type 12	296.6	290.0	304.0	+2.5	+4.8
South Carolina, type 13	155.7	175.0	184.0	+18.2	+5.1
Georgia and Florida, type 14	83.7	98.8	104.7	+25.1	+6.0
Total fire-cured, types 21-24:	135.2	62.6	57.0	-57.8	-8.9
Virginia, type 21	23.1	11.0	10.1	-56.3	-8.2
Kentucky and Tennessee, type 22	76.7	34.8	31.5	-58.9	-9.5
Kentucky and Tennessee, type 23	32.4	16.6	15.2	-53.1	-8.4
Henderson, type 24	3.0	.2	.2	-93.3	.0
Burley, type 31	347.2	432.0	434.4	+25.1	+.6
Maryland, type 32	36.7	46.6	48.0	+30.8	+3.0
Total dark air-cured, types 35-37:	42.0	29.9	28.9	-31.2	-3.3
One Sucker, type 35	19.9	16.2	15.7	-21.1	-3.1
Green River, type 36	18.8	10.7	9.8	-47.9	-8.4
Virginia sun-cured, type 37	3.3	3.0	3.4	+3.0	+13.3
Total cigar filler, types 41-44:	38.0	44.6	44.8	+17.9	+.4
Pennsylvania Seedleaf, type 41	23.4	38.4	39.2	+67.5	+2.1
Miami Valley, types 42-44	14.6	6.2	5.6	-61.6	-9.7
Total cigar binder, types 51-56:	3/ 29.9	39.8	35.6	+19.1	-10.6
Connecticut Valley Broadleaf, type 51	7.2	9.3	8.1	+12.5	-12.9
Conn. Valley Havana Seed, type 52	5.4	9.0	8.1	+50.0	-10.0
N. Y. and Pa. Havana Seed, type 53	.7	1.0	1.1	+57.1	+10.0
Southern Wisconsin, type 54	8.9	8.2	7.8	-12.4	-4.9
Northern Wisconsin, type 55	6.7	12.2	10.4	+55.2	-14.8
Georgia and Florida sun-grown, type 56	3/ 1.0	.1	.1	-90.0	.0
Total cigar wrapper, types 61-62:	8.9	15.0	15.6	+75.3	+4.0
Conn. Valley shade-grown, type 61	6.3	10.5	10.9	+73.0	+3.8
Ga. and Fla. shade-grown, type 62	2.6	4.5	4.7	+80.0	+4.4
Louisiana Perique, type 72	.3	.3	.3	.0	.0
Total all types	1,501.3	1,554.6	1,596.3	+6.3	+2.7

1/ Preliminary.
2/ Farmers' intentions as of March 1.
3/ Includes a small amount of type 45 supplanted by type 56.

Table 12.- Cash receipts from farm marketings, 1935-39 average; annual 1940-48 with percentages

Calendar year	Tobacco 1/	Crops other than tobacco	Livestock and products	Total cash receipts	Tobacco as percent of Total crops	Tobacco as percent of Total cash receipts
	Mil.dol.	Mil.dol.	Mil.dol.	Mil.dol.	Percent	Percent
1935-39	274	3,153	4,555	7,982	8.0	3.4
1940	242	3,229	4,893	8,364	7.0	2.9
1941	321	4,395	6,465	11,181	6.8	2.9
1942	476	5,855	9,041	15,372	7.5	3.1
1943	539	7,441	11,454	19,434	6.8	2.8
1944	688	8,350	11,322	20,360	7.6	3.4
1945	898	8,640	11,982	21,520	9.4	4.2
1946	954	10,211	13,699	24,864	8.5	3.8
1947 2/	1,028	12,668	16,490	30,186	7.5	3.4
1948 2/	1,003	12,591	17,425	31,019	7.4	3.2
1948 as percent of 1935-39	366	399	383	389	---	---
1948 as percent of 1947	98	99	106	103	---	---

1/ Calendar year receipts are derived from parts of two crops and should not be confused with the value of a particular year's production.
2/ Preliminary.

Table 13.- Tax-paid withdrawals of tobacco products in the United States, calendar years 1947 and 1948, and January-April 1948-49 1/

Products	Calendar year 1947	Calendar year 1948	Change	January-April 1948	January-April 1949	Change
	Million	Million	Percent	Million	Million	Percent
Small cigarettes	335,964	348,730	+3.8	111,818	111,865	0.0
Large cigarettes	0.5	0.7	+40.0	2/	2/	+40.7
Large cigars	5,631	5,775	+2.6	1,842	1,735	-5.8
Small cigars	81	90	+11.1	32	26	-18.8
Snuff 3/	39.3	41.4	+5.3	14.7	13.8	-6.1
Manufactured tobacco 3/	199.2	199.7	+.3	65.0	60.5	-6.9

1/ Based on sales of revenue stamps, and includes products from Puerto Rico.
2/ 182,570 in 1948 and 256,937 in 1949.
3/ Million pounds.

U. S. Department of Agriculture
Washington 25, D. C.

Penalty for private use to avoid payment of postage $300

OFFICIAL BUSINESS

BAE-TS-48-5/49-2000
Permit No. 1001

UNIVERSITY OF FLORIDA
3 1262 08902 3526

UNIVERSITY OF FLORIDA
LIBRARY
DOCUMENTS DEPT.
5-16-49
FNS-13
GAINESVILLE, FLA.

Table 14.- Production of manufactured tobacco in the United States, for specified periods

Calendar year	Chewing					Smoking	Snuff
	Plug	Twist	Fine-cut	Scrap	Total		
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
1937-41 average	52.6	5.9	4.7	43.4	106.6	198.7	38.0
1942	54.3	6.0	5.1	48.3	113.7	175.7	41.0
1943	58.9	6.3	4.5	51.4	121.1	162.8	43.2
1944	61.7	6.5	4.1	52.9	125.2	139.9	42.0
1945	59.7	6.7	4.0	47.7	118.1	168.5	43.8
1946	51.8	5.8	3.8	46.1	107.5	106.4	39.4
1947	47.4	5.2	3.7	42.2	98.5	104.7	39.2
1948	45.3	5.6	3.2	42.4	96.5	107.6	40.8
Jan.-Feb. 1948	7.0	.9	.7	6.6	15.2	15.8	6.8
Jan.-Feb. 1949	6.1	.9	.4	6.5	13.9	14.9	6.7
	Percentage change						
1937-41 av. to 1948	-13.9	-5.1	-31.9	-2.3	-9.5	-45.9	+7.4
1947-1948	-4.4	+7.7	-13.5	+.5	-2.0	+2.9	+4.1